DISPATCH (PRINT) THE PURCHASE ORDER

State of North Dakota
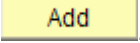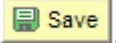
Exercise 1: Set Up Your Run Control ID.

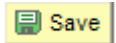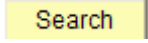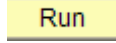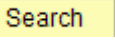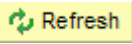| Steps	Directions	Comments
	**BEFORE STARTING THE EXERCISE, PLEASE MAKE SURE THAT YOU ARE IN THE TRAINING ENVIRONMENT:** https://www.connectnd.us/psp/ndrt/?cmd=login. **Use your regular User ID and password.**	
1.	**Navigation:** *Purchasing → Purchase Orders → Dispatch POs*	
2.	Click the '**Add a New Value'** tab.	
3.	Type "**DISPATCH_PO**" Click [Add].	**NOTE:** Be sure to use an underline (__) instead of spaces whenever you set up a run control ID.
4.	**Business Unit**: Type or Click 🔍 to enter your Business Unit.	
5.	**PO ID:** • Click the **Select Purchase Order** hyperlink • Click [Search] • Your agency's POs that are available for printing will show up, ten at a time, with the most recent on top. • Select the one you wish to print at this time.	*If you know the number of the purchase order, you may simply enter that number in the field, then verify it by using the look-up feature 🔍.*
6.	In the **Miscellaneous Options** group box, select the following: ➢ **Statuses to Include** = don't check any boxes ➢ **Dispatch Methods to Include** = just "Print" should be checked for now ➢ **Chartfields** = Recycled AND Valid Chartfields ➢ **Change Orders** = Changed and Unchanged Order ➢ **Test Dispatch** should <u>NOT</u> be checked. ➢ **Print Copy** = check this box only if you need more than one copy of the PO. ➢ **Print BU Comments** should be checked. ➢ **Print PO Item Description** should be checked.	*Note: If all dispatch methods are checked by default, that is OK.* *If 'Number of Copies' states "1", two copies of the PO will print.*
7.	Click [Save].	
8.	You are now ready to move on to Exercise 2.	*For a quick review on how to dispatch POs, see the checklist at:* *http://www.nd.gov/spo/connectnd/docs/dispatching-printing.pdf.*

Exercise 2: Dispatch (Print) a Single Purchase Order.

Steps	Directions	Comments
1.	**Navigation:** *Purchasing → Purchase Orders → Dispatch POs*	
2.	On the '**Find an Existing Value'** Page: Click Search .	
3.	The run control ID you just set up and saved should show up (DISPATCH_PO). Click on that link.	
4.	Make sure that your business unit filled in on both the Business Unit fields.	
5.	Enter the PO you wish to print by: • Entering the PO number in the PO ID field • Click the **Select Purchase Order** hyperlink and search. Click Run .	
6.	The **Process Scheduler Request** page will come up. Make sure the **Server Name** is blank. Select the box next to '**PO Dispatch/Print'** in the middle. ➢ Verify that the Type = **Web** and the Format = **PDF**. Click OK.	
7.	Click on the **Process Monitor** hyperlink. Verify that your user ID appears in the upper left corner. Look for the Process Name **POPO005**. Click the Refresh button every 60 seconds until the run status changes to "**Success"** and the distribution status is **Posted**.	
8.	Click the **Details** hyperlink, then the **View Log/Trace** link.	
9.	Click the **PDF** link that begins with "**POPO005**." Your PO should be ready for printing. Look it over for any errors first. 1. If your PO has multiple lines or schedules, they will be listed separately on this view. 2. If you entered **Line Comments**, they should show up underneath the last item for the appropriate Ship To location. 3. If you entered **Header Comments**, they will show up after all items have been listed, just above the **Total PO Amount**. 4. If you chose to have a copy of each PO print, there should be two pages for each PO. 5. There should be an authorized approver's name in the bottom right corner of each PO.	**NOTE:** If the Dispatch process does not work, or if the PO prints with an "Unauthorized" signature, go back and check that: ➢ The PO is budget checked correctly. Review distribution lines, if necessary. ➢ "Test Dispatch" should not be checked on the run control ID used. ➢ Did the PO receive final approval?
10.	Print the purchase orders and fax or distribute as necessary.	
11.	*To determine whether or not you should batch print your PO's:* 1. Do you only enter one or two POs each day? Then you can print them individually. 2. Do you enter several POs a day, or save them up to do several one day a week? Then use the **batch dispatching** process as the next two exercises show.	

Exercise 3: Set up a Run Control ID for Batch Printing.

Steps	Directions	Comments
1.	**Navigation:** *Purchasing → Purchase Orders → Dispatch POs*	
2.	Click the '**Add a New Value'** tab.	
3.	Create a new run control ID that incorporates your name. Example "**BATCH_JANE**" Click Add .	**NOTE:** Be sure to use an underline (__) instead of spaces whenever you set up a run control ID.
4.	**Business Unit**: Type or Click 🔍 to enter your Business Unit to fill in both fields.	
5.	**Do NOT enter a PO ID.** Instead, enter your name as a buyer in the **Buyer** field.	*Because the buyer field is mandatory for batch printing, it helps if that buyer's name is used in the Run Control ID name.*
6.	In the '**From**' and **Through' Dates**, click on the calendar and select today's date. ➢ A range of dates can be entered as well. ➢ These dates must be changed each time you run a batch dispatch, however.	*It is important that these dates be checked each time, because:* *1. The PO you really want to print may not show up with the dates selected, or* *2. You may accidentally run old POs for printing again.*
7.	In the **Miscellaneous Options** group box, select the following: ➢ **Statuses to Include** = be sure to check all boxes. This step is different from the single PO dispatching. ➢ **Dispatch Methods to Include** = all methods can be included ➢ **Chartfields** = Recycled AND Valid Chartfields ➢ **Change Orders** = Changed and Unchanged Order ➢ **Test Dispatch** should NOT be checked. ➢ **Print Copy** = check this box only if you need more than one copy of the PO. ➢ **Print BU Comments** should be checked. ➢ **Print PO Item Description** should be checked.	*If 'Number of Copies' states "1", two copies of the PO will print.*
7.	Click 💾 Save .	
8.	You are now ready to move on to Exercise 4.	

Exercise 4: Printing Multiple POs with Batch Dispatching.

Steps	Directions	Comments
1.	**Navigation:** *Purchasing → Purchase Orders → Dispatch POs*	
2.	On the '**Find an Existing Value'** Page: Click **Search**.	
3.	The run control ID you just set up and saved should show up: **BATCH_(your name)**. Click on that link.	
4.	Make sure that your business unit filled in on both the Business Unit fields.	
5.	Verify that your name is filled in as buyer.	*PO Administrators can run the Batch Dispatch process for their agency's buyers by changing the buyer's name. Setting up individual run control ID's under the buyers' names helps them do this.*
6.	CHANGE THE DATES if necessary. You will want to make sure that all <u>your</u> unprinted POs are included in this batch. Make sure that all **Statuses to Include** are checked. Verify that at least "**Print**" is checked for a dispatch method and that **Test Dispatch** is NOT checked.	
7.	Click **Run**.	
7.	The **Process Scheduler Request** page will come up. Make sure the **Server Name** is blank. Select the box next to '**PO Dispatch/Print'** in the middle. ➢ Verify that the Type = **Web** and the Format = **PDF**. Slick OK.	
8.	Click on the **Process Monitor** hyperlink. Verify that your user ID appears in the upper left corner. Look for the Process Name **POPO005**. Click the **Refresh** button every 60 seconds until the run status changes to "**Success"** and the distribution status is **Posted**.	
9.	Click the **Details** hyperlink, then the **View Log/Trace** link.	
10.	Click the **PDF** link that begins with "**POPO005**." Your PO should be ready for printing. Look it over for any errors first. 1. If your PO has multiple lines or schedules, they will be listed separately on this view. 2. If you entered **Line Comments**, they should show up underneath the last item for the appropriate Ship To location. 3. If you entered **Header Comments**, they will show up after all items have been listed, just above the **Total PO Amount**. 4. If you chose to have a copy of each PO print, there should be two pages for each PO. 5. There should be an authorized approver's name in the bottom right corner of each PO.	**NOTE:** If the Dispatch process does not work, or if the PO prints with an "Unauthorized" signature, go back and check that: ➢ The PO is budget checked correctly. Review distribution lines, if necessary. ➢ "Test Dispatch" should not be checked on the run control ID used. ➢ Did the PO receive final approval? ➢ Were the dates changed in the run control screen?

Steps	Directions	Comments
11.	Print the purchase orders and fax or distribute as necessary.	